



# H.E. Turner & Co., Inc.

F U N E R A L H O M E

EXPERIENCE • COMMITMENT • TRUST

## Family Priority Checklist

### Priority One

Vital Record Request  
(Birth/Marriage Certificate)  
Bank(s) and Credit Union(s)  
Accountant/Tax/Financial  
Planner

Notify Social Security  
Claim Life Insurance Benefits  
Change Beneficiary  
Executor/Trustee/  
Administrator

Attorney  
Brokers/Investment Managers  
Pension/Annuity  
Transfer Home/Automobile(s)

### Priority Two

Newspaper Delivery  
Appraiser  
Finance/Loan Company  
Mortgage Loan(s)  
Credit Cards (Change of Cancel)  
Request for Credit Report  
Umbrella Liability Insurance  
Vehicle Insurance

Disability Insurance  
Landlord, Leased Property  
Manager of Investment Property  
Tenant(s) of Investment  
Property  
Telephone/Gas/Water/Garbage/  
Internet Providers

Doctor/Hospital/Nursing Home  
Cell Phone Provider  
Security Company  
Rented Furniture/Appliance  
Company  
Cancellation of Driver's License  
Lawn Maintenance Service  
Meals on Wheels  
Dry Cleaner

### Priority Three

Automobile/Boat Maintenance  
Jeweler  
Travel Pass (bus/rail/air)  
Travel/Purchase Point Awards  
Program  
Travel Agent  
Auto Club

Memberships  
(Professional/Social)  
Memberships (General)  
Pharmacy  
Service Club(s)  
Pest Control  
Heating/Air Conditioning  
Service

Pool/Spa Service  
Mail Order/Mailing Lists  
Magazine Subscription(s)  
Dentist  
Veterinarian  
Church Secretary